

Fermilab – Technical Division

Tooling Management Strategy and Procedure

TD-1160

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The purpose of this document is to define the Division's overall strategy for managing the tooling necessary for the various fabrication or repair projects supported by the Technical Division. It is to serve as a guide, to all Departments/Groups involved, of how this work is to be done.

The two main Departments involved in managing tooling are Material Control (MC) and Engineering & Fabrication (EF). MC is responsible for the tooling while it is in storage and in transit, EF is responsible for the tooling when in use or on the production floor.

The following are general guidelines to be followed (parenthesis identify responsibilities):

- All tooling in storage is to be appropriately crated and physically identified (EF);
- If needed, pictures should be taken of all tooling prior to sending to storage (EF/MC);
- All pertinent information regarding tooling is recorded in the appropriate database (EF/MC);
- While under the control of the EF department, appropriate maintenance is to be defined, conducted and documented (EF);
- Appropriate procedures are defined for handling, installing, uninstalling and preparing the tooling for long-term storage (EF);
- No tooling maintenance is performed while in storage.
- Before tooling is sent to storage, it is determined that it is appropriate to store the tooling long-term (EF/MC). The factors effecting this decision include:
 - o Long-term value of the tooling;
 - o Likelihood of future use;
 - o Are there duplicate sets of the tooling?
 - o Are the units for which the tooling is used still in service?
- As a part of overall inventory management, the tooling inventory is periodically reviewed (EF/MC). At these reviews a decision is reached as to whether or not to continue storing each set of tooling. The factors effecting this decision are the same as those listed above for sending the tooling to storage.



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The following is the general process used by the Division to manage tooling:

- 1. The EF department requests the tooling be removed from storage and delivered to the appropriate location.
- 2. The MC department locates the tooling and delivers it to the requested site and updates their database accordingly.
- 3. The EF department installs, uses, and maintains the tooling.
- 4. The EF department prepares, crates and identifies the tooling in preparation for storage.
- 5. The EF department requests that the tooling be sent back to storage.
- 6. The MC department places the tooling in storage and adjusts the database accordingly.

New tooling would pick up this process at step three, once the procurement and inspection have been satisfactorily completed.